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MUSIC USA

1992

The American Music Conference's 1992 statistical review of the U.S. music industry with highlights of AMC's new survey of adults' attitudes toward music

THE AMERICAN MUSIC CONFERENCE

WHAT IS AMC?

The American Music Conference, a national non-profit educational association, was founded in 1947 to encourage active amateur music-making and music education for people of all ages. AMC's goals are to build credibility for music and music education, especially at an early age, and to expand that portion of the American population that enjoys and makes its own music, and that supports music and the arts and understands their value in education.

AMC's ten-fold mission is to:

- Educate the general public about the benefits of music in education, recreation and cultural activities.
- Encourage the support, continuation and improvement of the standards of music education in schools.
- Increase appreciation of the value of music in the home, as an avocation and as a character-building activity for youngsters.
- Encourage adult instrumental and choral participation.
- Further interest in and attendance at professional entertainment and cultural performances.
- Promote the use of music in industry and therapy.
- Provide technical assistance and advice as requested by governmental agencies that engage in the support of community and other musical activities.
- Give recognition to personal effort, distinguished service and leadership in developing musical activities.
- Acquire and disseminate information, and produce publications and publicity.
- Cooperate with and support other organizations in the development and advancement of music and musical activities.

WHAT DOES AMC DO?

As the public relations arm of the entire U.S. music community, AMC's ongoing programs in support of its mission include:

Consumer Publicity

Publicizing the benefits of music-making and music education with a variety of messages that reach millions of Americans each year through stories carried by national wire services and newspapers, television and radio broadcasts, cable television programs, consumer magazines, industry and music educator trade publications, and other print media.

Support Materials

Developing materials to support the efforts of local and state advocacy groups.

Consumer Research

Conducting national consumer research into Americans' attitudes toward music-making and music education, and trends in musical instrument usage.

Information Source

Serving as the source which governmental agencies, educators, news media, financial analysts, advertising agencies, and the public rely on for information about music-making.

WHO DOES AMC REPRESENT?

Members include the entire music community and everyone who understands the importance of music and the other arts in our society.

HOW TO BECOME AN AMC SUPPORTER

For those who wish to support AMC's mission, contributions can be made to AMC in a number of different ways. For more information, please contact: Karl Bruhn, Executive Director, American Music Conference, 5140 Avenida Encinas, Carlsbad, California, 92008-4391. Telephone: (619) 431-9124.

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FROM THE PRESIDENT

- More than eight out of ten American adults believe that schools should offer instrumental music instruction as part of the regular curriculum and that communities should provide financial support for music education in their schools. These two insights regarding music education are revealed in the American Music Conference's latest nationwide survey of adults' attitudes toward music and music education; a survey that found respondents in near universal agreement that music is worthwhile and who say they are willing to encourage children's musical development.

- In reality, school music program budgets in many parts of this country are being cut back drastically or eliminated completely, leaving America's young people with no exposure to or chance to learn and participate in music and the other arts. In addition to budgetary problems, music education and the other arts are being adversely affected by AMERICA 2000, our national education strategy. The six clearly defined goals of AMERICA 2000 did not include the arts and other important subjects.

Since the basic purpose of AMC is to increase active amateur music participation and music education for people of all ages, a change in the association's direction and focus was deemed necessary to help bridge the gap between what Americans believe about music participation and music education, and what is reality.

To that end, the American Music Conference board of directors, at its 1992 annual meeting, unanimously approved several major changes in the association's future focus, direction, and activities.

The key change was a commitment to focus AMC's efforts for the next two years on the National Coalition for Music Education as the first major active AMC project. The National Coalition's goal is that "every child in every school will receive a well-rounded education that includes a comprehensive, sequential, high-quality program of music taught by a certified music teacher." (Coalition founders are the Music Educators National Conference, the National Academy of Recording Arts & Sciences, Inc., and the National Association of Music Merchants.)

Without music education our country is losing not only current players — whether they be piano players, guitar players, or trumpet players — we are losing an entire generation that will not know the joys of playing, or listening to and supporting music. Nor will this generation be as likely to expose and involve their own children in music and the other arts.

One of the most succinct summations of the issue comes from noted musician and recording artist Wynton Marsalis. As he noted in *Growing Up Complete, The Imperative for Music Education, The Report to the National Commission on Music Education* (March 1991), "Our nation really suffers from a cultural problem more than a scientific one...Our culture is dying from the inside."

This simple statement lays a real challenge at the feet of everyone who believes in the power of music and the necessity of music education. The American Music Conference has responded to that challenge through its new focus and future direction.

I would like to thank everyone (particularly the National Association of Music Merchants for its support of this publication and the 1992 adult attitude survey) who supports AMC's programs and projects. And, on behalf of all current and future amateur musicians, I welcome those who will join us and support us in our exciting new efforts to educate and inform Americans about the importance of music and the arts.

Jerry Gorby

Jerry Gorby
President

MUSIC INDUSTRY SALES

How to Read the Data

All units in this annual review represent shipments by manufacturers; dollar figures represent estimated retail value. Imports, and in some cases exports, are included where noted.

To provide an indicator of actual sales at the music retailer level, this review also includes the results of the National Association of Music Merchants' (NAMM) ongoing survey of music stores around the country.

The total 1991 retail value of $3.39 billion represents in large part manufacturers' shipments sold through music stores. However, in the past several years, the numbers of different outlets selling musical instruments have increased, particularly with the popularity of electronics. Therefore, in categories where it is appropriate, dollar figures also include estimated sales through mass merchandisers, major audio chains, direct mail companies, department stores, and direct to consumers by manufacturers, publishers or distributors.

It should be noted that retail dollar estimates in this report are based on shipments to retailers which may or may not have been sold to consumers each year. The sources of these figures vary widely depending on the availability of a reporting mechanism, the nature of the mix of U.S.-made instruments and imports, and whether the category consists of mostly imported instruments that may or may not be correctly classified by the U.S. Customs Department.

Eight categories in this review are based on organized but voluntary reporting systems, and even within these categories (pianos, organs, woodwinds, brass, percussion, portable keyboards, synthesizers, and electronic pianos), estimates have been made for manufacturers who do not report their shipments.

In the category of printed music, figures are based on best estimates of experts in this segment of the industry using as a baseline a 1990 survey by the National Music Publishers Association.

String data has been analyzed by industry experts who have tracked both domestic manufacture and imports.

In categories where there are no applicable import schedules and no reporting system, a representative number of manufacturers have been interviewed to arrive at a consensus on the size of the market.

This review omits several manufacturing areas for which it is extremely difficult to compile any data, including kits for assembly of instruments, harps, a variety of inexpensive instruments used in elementary education, musical toys, and estimates for craft production other than for bowed string instruments. There is also a brisk market for used or rental instruments which AMC does not follow.

Imports/Exports

Imports are figured into all relevant categories; exports are included only where indicated.

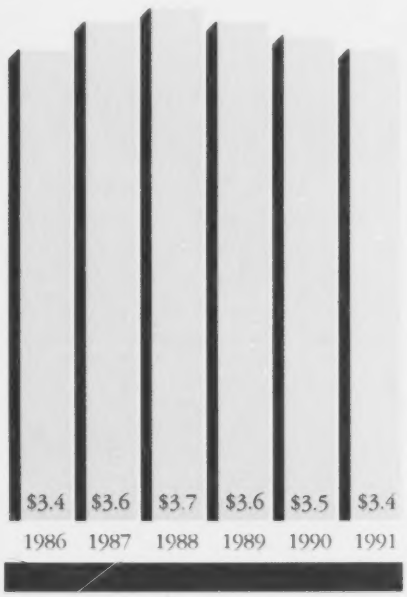
Determining the exact number of units made and sold domestically is becoming more complex each year due to the changing nature of imports. For example, some foreign manufacturers are shipping parts from abroad and assembling in the United States, some have built plants here. Government reporting categories, amplified in 1989, still are inadequate to provide a clear view of exactly what types of electronic instruments are being shipped to the U.S.

The data that appears in this statistical review represents several months of intensive discussions and work with a great many music industry experts. I would like to thank all of those men and women for their help, the insights they provided, and the time they have devoted to helping compile this information.

Paul Bjorneberg
Editor

1991 Retail Value of New Musical Instruments, Sheet Music, and Musical Accessories Down 4 Percent to $3.39 Billion

Music Industry Retail Dollars 1986–1991 (Billions)

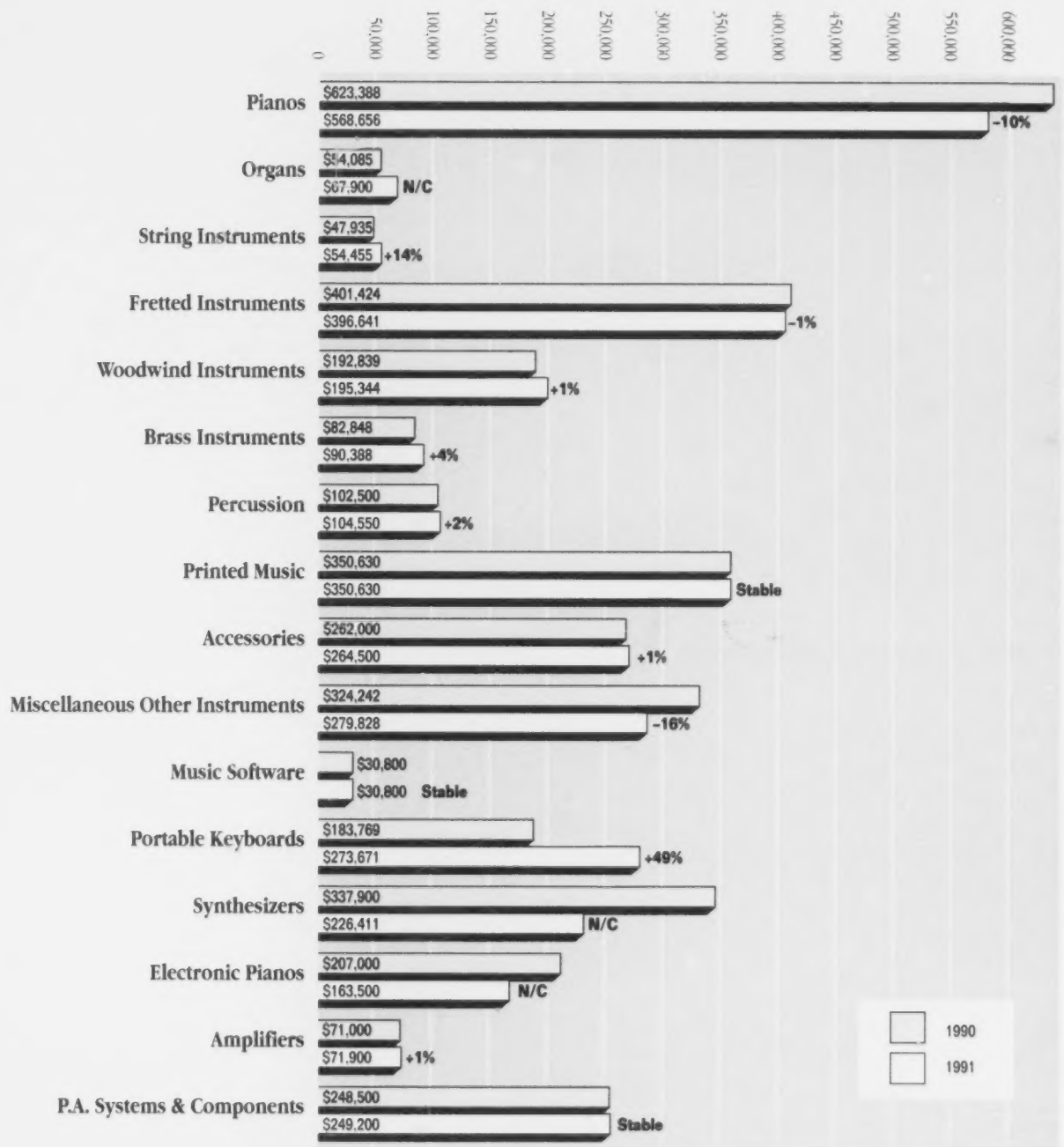


	Music Industry Retail Value	Personal Consumption	Percent of Personal Consumption[3]	Gross National Product	Cost Living Index
		(Billions)		(Billions)	1967=100
1991	$3,388,374,000	$3,889.1	0.087%	$5,685.8	408.0
1990	3,520,860,000	3,657.3	0.096%	5,465.1	391.4
1989	3,602,146,000	3,471.1	0.104%	5,234.0	371.3
1988	3,716,140,000	3,227.5	0.115%	4,864.3	354.3
1987	3,677,747,000	3,012.1	0.122%	4,526.7	340.4
1986	3,344,957,000	2,762.5	0.121%	4,206.1	328.4
1985	2,697,900,000	2,582.1	0.104%	3,989.1	322.2
1984	2,496,333,000	2,342.3	0.107%	3,661.3	311.1
1983	2,346,247,000	2,157.0	0.109%	3,310.8	298.4
1982	2,207,745,000	1,971.1	0.112%	3,059.3	289.1
1981	2,375,610,000[4]	1,857.8	0.128%	2,924.8	272.4
1980	2,180,800,000	1,672.8	0.130%	2,626.1	246.8
1979	2,353,609,000	1,509.8	0.156%	2,368.8	217.4
1978	2,299,690,000	1,340.1	0.172%	2,107.6	195.4
1977	2,090,204,000	1,260.2	0.166%	1,963.7	181.5
1976	1,919,010,000	1,079.7	0.178%	1,691.6	170.5
1975	1,741,977,000	963.8	0.180%	1,498.9	161.2
1974	1,821,353,000	877.0	0.207%	1,396.7	147.7
1973	1,524,427,000[1]	804.0	0.189%	1,289.1	133.1
1972	1,306,179,000[2]	721.0	0.181%	1,151.8	125.3
1971	1,106,339,000	662.1	0.167%	1,046.8	121.3
1970	1,005,239,000	616.7	0.163%	976.5	116.3
1969	957,020,000	577.5	0.167%	931.4	109.8
1968	954,138,000	536.6	0.177%	865.7	104.2
1967	924,000,000	491.7	0.187%	785.0	100.0
1966	955,000,000	469.9	0.205%	739.6	97.2
1965	887,000,000	428.7	0.206%	676.3	94.5
1964	731,000,000	398.9	0.183%	628.7	92.9
1963	661,000,000	373.8	0.177%	589.2	91.7
1962	608,000,000	355.1	0.170%	500.3	90.6
1961	538,000,000	335.1	0.160%	520.1	89.6
1960	500,000,000	325.2	0.154%	503.8	88.7
1955	380,000,000	254.4	0.150%	398.0	80.2
1950	235,000,000	191.0	0.124%	284.8	72.1

1. *For comparable figure in 1972, add $8,000,000 for non-reporting piano manufacturers previously not recorded, and $21,881,000 for higher sheet music shipments. Includes a new category—synthesizers.*
2. *Includes a new category—electric pianos.*
3. *To be read as a fraction of 1%.*
4. *Includes a new category—portable keyboards—plus revised estimates for several categories.*

Note: Government statistics on gross national product, personal consumption are revised annually. The figures noted on this chart are those available in May of every year when Music U.S.A. is compiled.

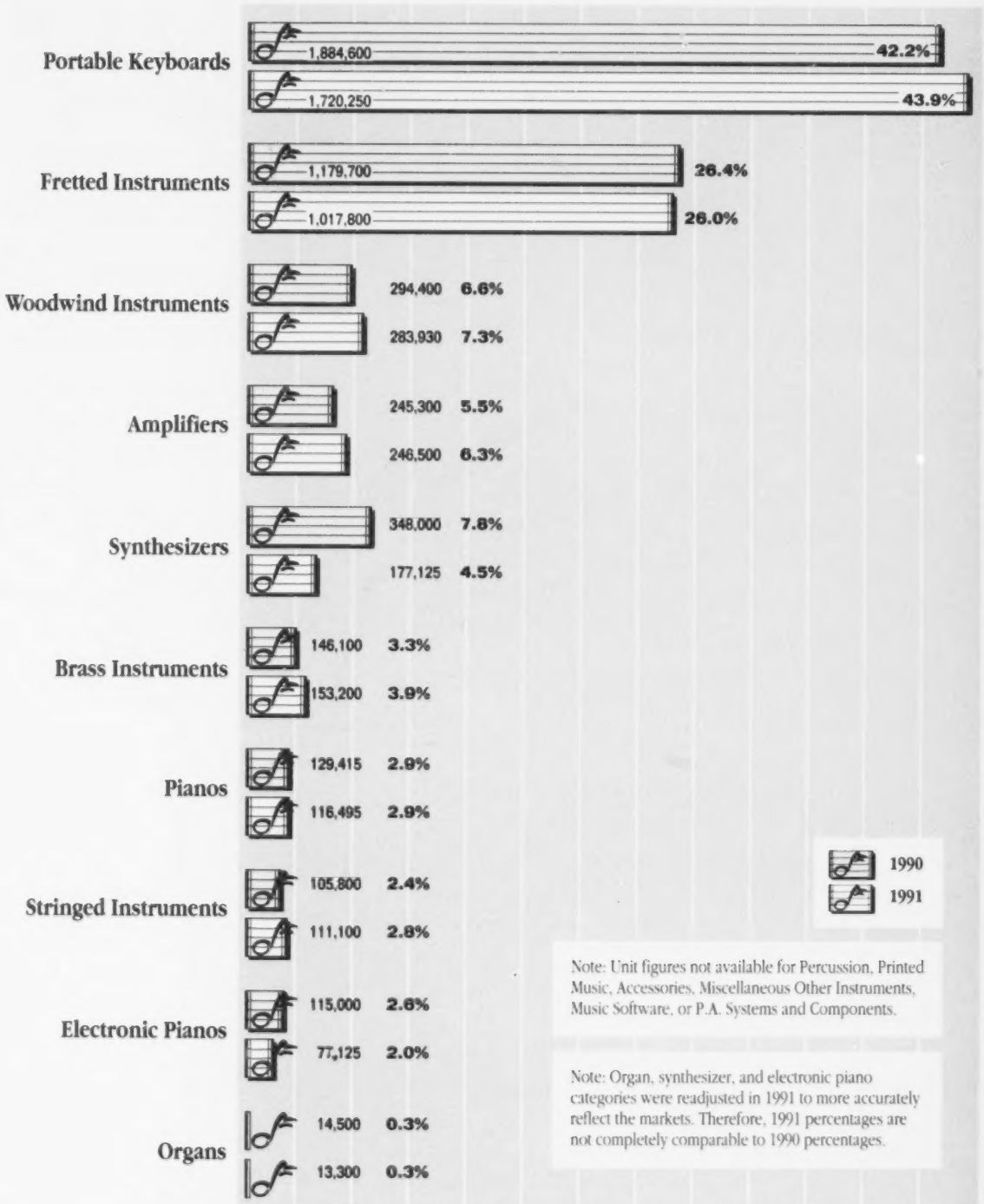
MUSIC USA
PRODUCT CATEGORIES
TOTAL DOLLAR COMPARISONS 1990-1991 (IN THOUSANDS)



N/C = Category readjusted, not comparable to 1990.

How the Musical Instrument Market is Divided:

Units (Rounded)

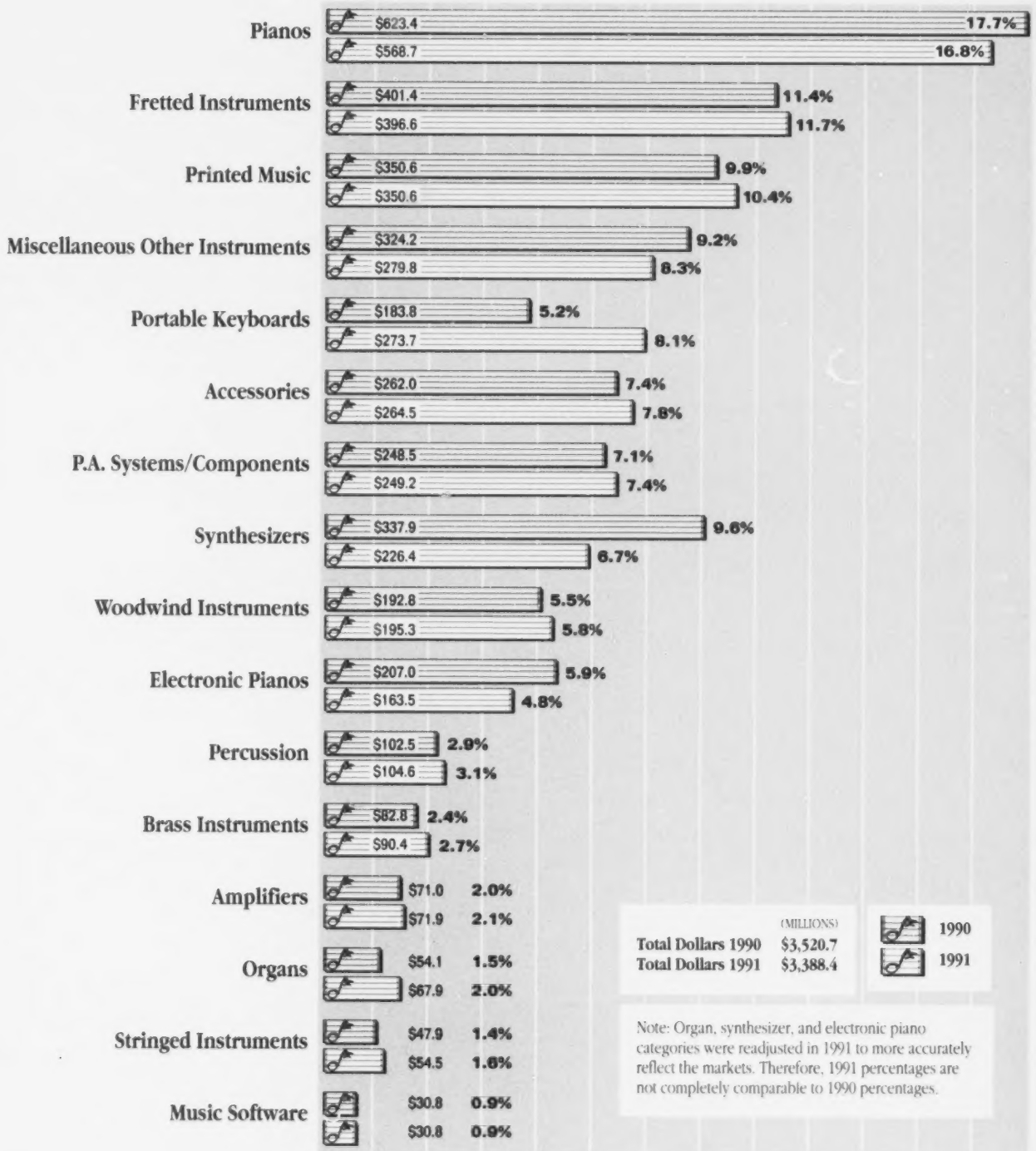


Note: Unit figures not available for Percussion, Printed Music, Accessories, Miscellaneous Other Instruments, Music Software, or P.A. Systems and Components.

Note: Organ, synthesizer, and electronic piano categories were readjusted in 1991 to more accurately reflect the markets. Therefore, 1991 percentages are not completely comparable to 1990 percentages.

How the Musical Instrument Market is Divided:

Dollars (in millions, rounded)



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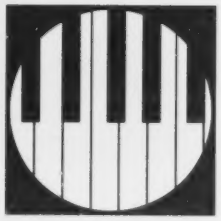


PIANOS

Includes: Domestic production, imports and exports. Player pianos are also included. Electric pianos are categorized separately.

Total acoustic pianos were down 11% in units and 10% in dollars. All grand pianos, combined, (which accounted for 54% of the category's total dollars, compared to 54% in 1990) were down 10% in dollars and 9% in units; all verticals dropped 11% in units and 9% in dollars. Total domestic units were down 18% and 14% in dollars. Total imports were off 4% in units and 6% in dollars. The two segments of this category showing increases over 1990 were imported verticals (up 2% in units and 3% in dollars) and exported grands (up 8% in units and 9% in dollars).

Pianos

	Units	Dollars[1]
1991	116,495	$568,656
1990	129,415	623,388
1989	138,745	623,351
1988	162,861	683,616
1987	174,993	682,725
1986	166,555	619,763
1985	151,300	480,690
1984	180,000	526,100
1983	197,000	454,345
1982	203,000	421,682
1981	231,000	458,304
1980	233,000	424,060
1979	275,600	452,000
1978	282,172	411,971
1977	258,918	345,914
1976	246,235	303,608
1975	217,329	260,795
1970	193,814	164,000
1960	198,200	148,650
1950	172,531	125,000
1940	136,332	95,000

[1] *In thousands of dollars.*
Source: National Piano Manufacturers Association and industry estimates.

ORGANS

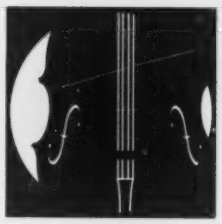
Includes: Domestic production and imports of single keyboard consoles and spinets (radiating and non-radiating pedal boards).

This category has been readjusted in 1991 to more accurately reflect market size. Therefore, units and dollars are not comparable to 1990 figures. During 1991, industry reports and sources noted a strong market for mid-range priced spinets with non-radiating pedal boards.

Organs

	Units	Dollars[1]
1991	13,300	$67,900
1990	14,500	54,085
1989	17,000	63,410
1988	25,500	95,162
1987	35,200	121,608
1986	40,000	140,000
1985	49,600	156,300
1984	58,000	174,000
1983	88,000	257,000
1982	101,000	249,000
1981	131,329	323,463
1980	138,724	339,000
1979	175,159	398,487
1978	199,654	478,770
1977	222,400	510,186
1976	217,267	462,779
1975	205,772	395,700
1970	137,500	215,400
1960	106,000	141,400
1950	10,000	14,000
1940	NA	NA

[1] *In thousands of dollars.*
Source: International Association of Electronic Keyboard Manufacturers, U.S. Tariff Commission, and industry estimates.



STRING INSTRUMENTS

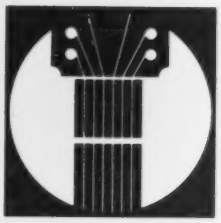
Includes: Imports and domestic production of violins, violas, cellos and basses.

String instrument units rose 5% and dollars were up 14% in 1991. European imports (which account for some 45% of the category's total units and 58% of the dollars) were up 21% in total dollars, reflecting double-digit increases in the value of product imported from Germany, Czechoslovakia, Hungary and Romania. Asian imports were up 5% in units and 6% in dollars. Domestic production was up slightly in units and posted an 8% increase in dollars.

String Instruments

	Units	Dollars[1]
1991	111,100	$54,455
1990	105,800	47,935
1989	113,300	43,116
1988	114,600	42,097
1987	102,740	40,144
1986	86,950	32,029
1985	70,000	26,138
1984	97,500	32,318
1983	93,000	30,000
1982	120,000	38,200
1981	109,500	36,300
1980	94,000	38,000
1979	92,000	39,330
1978	83,500	36,500
1977	75,000	25,200
1976	83,000	25,400
1975	91,225	28,000
1970	75,700	19,720
1960	40,600	7,300
1950	NA	NA
1940	NA	NA

[1] *In thousands of dollars.*
Source: U.S. Tariff Commission and industry estimates.



FRETTED INSTRUMENTS

Includes: Domestic production and imports. Exports are not included.

Total units for fretted instruments were down 16% in 1991 and dollars were off by 1%. U.S. manufacturers reported an 8% increase in units shipped domestically, with total estimated retail value up 5%. Imports—which represent 86% of this category's total units and 65% of its total dollars—were down 20% in units and up 5% in dollars. Contributing to a sharp decrease in units was a 43% drop in electric guitars imported to the U.S. market. Electric guitar units shipped from South Korea (the second largest importer in this category) were down by more than 50% compared to 1991.

Fretted Instruments

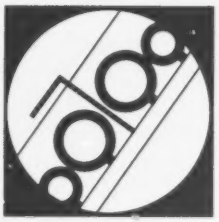
	Units	Dollars[1]
1991	1,017,800	$396,641
1990	1,179,700	401,424
1989	1,415,500	379,751
1988	1,422,355	412,325
1987	1,247,265	328,322
1986	1,121,235	302,033
1985	1,056,152	271,636
1984	994,607	236,000
1983	875,106	214,500
1982	1,213,138	252,805
1981[2]	1,332,550	320,417
1980	1,102,041	226,402
1979	1,890,006	301,957
1978	1,872,185	277,464
1977	1,655,572	238,932
1976	1,758,000	245,152
1975	1,540,234	185,036
1970[2]	2,214,686	159,910
1960	420,000	35,000
1950	220,000	22,000
1940	190,000	10,000

[1] *In thousands of dollars.*
[2] *These years also include estimates of amplifier and P.A. system shipments.*
Source: U.S. Tariff Commission and industry estimates.

Fretted Instruments

	1991		1990		1989	
Domestic	Units	Dollars	Units	Dollars	Units	Dollars
Includes non-electric guitars, electric guitars and other fretted instruments[1]						
Domestic Total ($ rounded)	146,325	$138,381,000	136,000	$131,500,000	135,000	$129,511,000
Imports						
Non-electric guitars	440,093	$114,368,000	452,130	$103,412,000	556,000	$110,016,000
Electric guitars	272,661	130,624,000	390,830	153,516,000	468,284	128,100,000
Other fretted[2]	158,801	13,268,000	200,740	12,996,000	256,148	12,124,000
Import Total ($ rounded)	871,555	$258,260,000	1,043,700	$269,924,000	1,280,500	$250,240,000
Grand Total ($ rounded)	1,017,800	$396,641,000	1,179,700	$401,424,000	1,415,500	$379,751,000

[1] *Includes domestic production of acoustic and electric guitars and banjos, ukuleles and mandolins.*
[2] *Includes banjos, ukuleles and mandolins.*

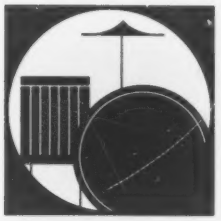


WOODWIND INSTRUMENTS

Includes: Domestic production as well as imports. Exports are not included.

BRASS INSTRUMENTS

Includes: Domestic production as well as imports. Exports are not included.



PERCUSSION

Includes: Domestic production of drums sold in sets, as marching band equipment; mallet instruments, and cymbals. Imports are included and exports are not.

During 1991, woodwinds were down 4% in units and up 1% in total dollars, while brass instruments rose 5% in units and 4% in total dollars. Increased demand was reported for trumpets and coronets; clarinets were stable, and shipments of flutes and piccolos were down compared to 1990.

The percussion market moved ahead 2% in total dollars during 1991. Shipments of concert snare drums and concert timpani posted double-digit increases, and marching snare drums were up slightly, according to industry reports.

Woodwind Instruments

	Units	Dollars[1]
1991	283,930	$195,344
1990	294,400	192,839
1989	306,700	191,704
1988	354,800	179,587
1987	346,996	171,035
1986	326,500	158,000
1985	309,800	141,390
1984	303,000	136,071
1983	326,000	142,055
1982	343,000	142,345
1981	345,000	135,515
1980	321,000	117,000
1979	328,000	114,400
1978	340,000	108,800
1977	337,400	100,498
1976	343,245	96,452
1975	359,000	94,417
1970	304,000	66,150
1960	241,000	45,300
1950	122,000	17,000
1940	110,000	6,000

Brass Instruments

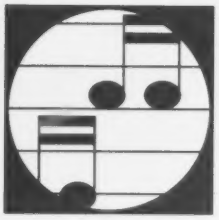
	Units	Dollars[1]
1991	153,200	$90,388
1990	146,100	82,848
1989	148,800	81,116
1988	152,335	78,132
1987	146,475	74,411
1986	139,500	69,150
1985	144,600	67,600
1984	143,000	65,544
1983	165,000	73,347
1982	168,000	71,064
1981	201,500	81,205
1980	197,000	74,800
1979	220,000	80,300
1978	229,000	76,715
1977	234,060	72,692
1976	238,600	70,000
1975	253,000	69,322
1970	225,000	51,000
1960	153,000	29,700
1950	85,000	13,000
1940	75,000	6,000

[1] *In thousands of dollars.*
Source: National Association of Band Instrument Manufacturers and industry estimates.

Percussion

	Dollars[1]
1991	$104,550
1990	102,500
1989	105,525
1988	105,525
1987	100,500
1986	90,000
1985	83,000
1984	82,000
1983	78,000
1982	78,475
1981	82,914
1980	69,017
1979	70,426
1978	61,240
1977	56,700
1976	53,000
1975	48,361
1970	32,000
1960	12,000
1950	NA
1940	NA

[1] *In thousands of dollars.*
Source: National Association of Band Instrument Manufacturers and industry estimates.



PRINTED MUSIC

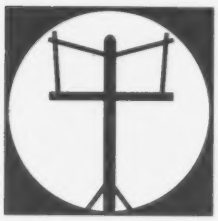
Includes: Domestic publishing of sheet music and self-instruction aids.

According to industry sources, a flattening of the pop music, school band and orchestra, and choral music markets contributed to this category showing no change from the previous year.

Printed Music

	Dollars[1]
1991	$350,630
1990	350,630
1989	340,417
1988	330,502
1987	308,880
1986	286,000
1985	275,000
1984	266,800
1983	253,000
1982	239,112
1981	236,900
1980	266,220
1979	261,000
1978	241,680
1977	228,000
1976	211,000
1975	197,750
1970	91 500
1967	72,000

[1] *In thousands of dollars.*
Source: National Music Publishers' Association and industry estimates.



ACCESSORIES

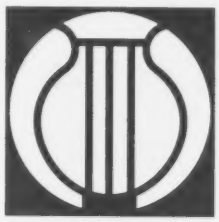
Includes: Estimates for sales of domestically made and imported strings, cases, straps, stands, drum sticks and other percussion accessories, reeds, metronomes, electronic pick-ups, distortion units and other types of electronic devices.

Total dollars moved up 1% in 1991. Guitar strings, the largest dollar volume segment, remained stable compared to 1990. Electronic accessories showed the largest gain, up approximately 6%.

Accessories

	Dollars[1]
1991	$264,500
1990	262,000
1989	260,000
1988	244,400
1987	230,700
1986	226,000
1985	208,000
1984	200,000
1983	198,000
1982	194,000
1981	194,500[2]
1980	247,000
1979	247,000
1978	236,000
1977	225,000
1976	217,967
1975	198,152
1970	108,400
1967	85,000

[1] *In thousands of dollars.*
[2] *Nearly $18 million of electronic accessories now included in "P.A. Systems and Components," and $15 million of cymbals moved to "Percussion" category.*
Source: Industry estimates



MISCELLANEOUS OTHER INSTRUMENTS

Includes: Imports of drums and other percussion instruments, electronic instruments such as rhythm machines, cymbals, mouth organs, pipe organs, harpsichords, accordions, hand held keyboards, organs valued under $400, and a variety of educational instruments.

Total dollars for this category, which includes 19 different types of imported instruments, were down 16% in 1991. Percussion instrument (drums, cymbals, and other percussion instruments) total dollars were down 18% and electronic instrument total dollars dropped 47%. Combined, percussion and electronics accounted for 56% of this category's total dollars, compared to 59% in 1990.

Miscellaneous Other Instruments

	Dollars[1]
1991	$279,828
1990	324,242
1989	334,150
1988	345,274
1987	301,214
1986	226,954
1985	211,161
1984	166,000
1983	151,000
1982	80,000
1981	133,888
1980	124,000
1979	136,600
1978[2]	151,000
1977[2]	91,000
1976	84,258
1975	100,887
1970	78,509
1967	53,800

[1] *In thousands of dollars.*
[2] *Includes $7 million in 1978 and $6 million in 1977 for accordions and concertinas.*
Source: U.S. Tariff Commission

MUSIC SOFTWARE

Includes: Domestic production of sequencing, music notation or sound editing and librarian software products that allow for the creation or composition of music for the purpose of performance, recording, or publishing.

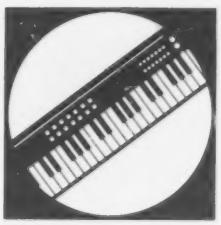
According to industry sources, the market for computer music software sold through music stores remained steady during 1991.

Music software sold through other outlets (computer stores, mail order, catalogs, direct sales and mass merchandising, etc.), however, was estimated to have doubled due to the strong demand for personal computer-compatible sound cards (which come bundled with software). Sources estimated this market segment's total retail value at $40 million to $60 million, putting the total music software market for 1991 between $70 million and $90 million.

Music Software

	Dollars[1]
1991	$30,800
1990	30,800
1989	27,500
1988	25,000
1987	20,000

[1] *In thousands of dollars.*
Source: Industry estimates.



PORTABLE KEYBOARDS

Includes: Imported keyboards with organ, synthesizer, or even electric piano characteristics that sell from under $100 to $1,000.

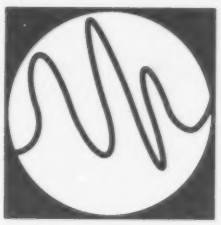
Total units dropped 10% in 1991, while dollars rose 49%. The large jump in dollars was due in large part to increases in the average per-unit retail prices in both the Under $300 and Over $300 subcategories; increased shipments of units in the mid- to upper-price range in both subcategories; and the introduction of new products. These new products (accounted for in the Under $300 subcategory) brought the average per-unit retail price up 75% over the previous year's average. Total units in the Under $300 subcategory were reported down 11% while dollars were up 57%. In the Over $300 subcategory, units were up 8% and dollars 26%, again reflecting a higher per-unit average retail value than the previous year.

	Units	Dollars
Under $300	1,592,150	$218,394,000
Over $300	128,100	55,729,000
Total	1,720,250	$273,671,000

Portable Keyboards

	Units	Dollars[1]
1991	1,720,250	$273,671
1990	1,884,600	183,769
1989	3,092,000	315,937
1988	4,255,400	401,158
1987	4,798,000	548,750
1986	2,500,000	526,500
1985	1,300,500	253,285
1984	534,000	193,000
1983	282,000	150,000
1982	NA	98,200
1981	NA	53 900 [2]
1980	NA	7,586 [3]

[1] *In thousands of dollars.*
[2] *Included in Miscellaneous Other Instruments and in Portable Keyboards in 1981.*
[3] *Included in Miscellaneous Other Instruments in 1980.*
Source: International Association of Electronic Keyboard Manufacturers and industry estimates.



SYNTHESIZERS

Includes: Domestic production, imports and exports of keyboards, sound modules, sequencers, sampling units/keyboards, and controller keyboards.

This category has been readjusted in 1991 to more accurately reflect market size. Therefore, units and dollars are not comparable to 1990 figures. Of the products included in this category, industry sources reported solid demand for sound modules (both rack mount and non-rack mount), and increased markets for drum machines and sequencers in the low- to mid-range price points.

Synthesizers

	Units	Dollars[1]
1991	177,125	$226,411
1990	348,000	337,900
1989	322,000	322,188
1988	361,800	303,040
1987	378,500	299,900
1986	350,500	275,000
1985	220,000	173,200
1984	134,700	136,000
1983	66,000	80,000
1982	43,000	50,000
1981	34,500	33,000
1980	36,606	32,300
1979	24,172	24,172
1978	24,050	24,050
1977	23,500	23,500
1976	18,000	17,100
1975	15,000	13,500
1974	10,000	11,000
1973[2]	7,000	8,000

[1] *In thousands of dollars.*
[2] *First year for inclusion of this category.*
Source: International Association of Electronic Keyboard Manufacturers and industry estimates.

ELECTRONIC PIANOS

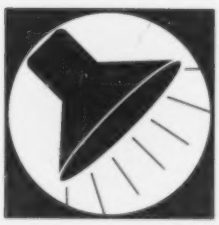
Includes: Domestic production, imports and exports of portable electronic pianos with either weighted or non-weighted action; under 88 keys and 88 keys in either traditional or non-traditional type cabinets; and with automatic accompaniment.

This category has been readjusted in 1991 to more accurately reflect market size. Therefore, units and dollars are not comparable to 1990 figures. In general, according to industry reports and sources, the majority of products included in this category showed increases in units shipped during 1991. Electronic pianos with 88 keys and automatic accompaniment, and those with 88 keys in non-traditional type cabinets, accounted for some 44% of the category's total retail dollars.

Electronic Pianos

	Units	Dollars[1]
1991	77,125	$163,500
1990	115,000	207,000
1989	114,750	206,551
1988	108,255	181,868
1987	103,100	173,208
1986	84,000	134,400
1985	60,000	107,000
1984	50,000	50,000
1983	44,000	44,000
1982	40,000	40,000
1981	37,000	40,700
1980	40,000	40,000
1979	38,737	38,737
1978	25,000	25,500
1977	25,000	24,500
1976	23,300	19,600
1975	22,000	17,600
1974	21,000	14,700
1973	19,000	11,400
1972[2]	15,000	9,000

[1] *In thousands of dollars.*
[2] *First year for inclusion of this category.*
Source: International Association of Electronic Keyboard Manufacturers and industry estimates.



SOUND REINFORCEMENT EQUIPMENT

Includes: Domestic production and imports sold through music stores. Exports are not included.

Guitar amplifiers remained steady in units, while dollars moved up 1% during 1991. Industry sources pointed to a steady market for low-priced amplifiers among first-time purchasers.

There was little change in dollars for P.A. systems and components compared to 1990. Speaker systems (the largest dollar volume segment) remained steady during 1991. Speaker systems and signal processors (the two largest dollar volume segments) combined accounted for 38% of the category's total dollars.

Amplifiers

	Units	Dollars[1]
1991	246,500	$71,900
1990	245,300	71,000
1989	233,600	66,370
1988	212,350	61,454
1987	200,300	58,250
1986	188,700	55,228
1985	170,000	51,500
1984	166,000	51,500
1983	157,000	50,000
1982	177,000	57,500
1981	177,000	63,860
1980	177,000	62,000
1979	177,000	68,200
1978	177,000	62,000
1977	161,000	48,000
1976	158,000	48,000
1975	154,000	50,000
1974	140,000	55,000
1973	133,980	53,592
1972	110,000	43,245

[1] *In thousands of dollars.*
Source: Industry estimates.

P.A. Systems and Components

(mikes, mixers, power amplifiers, speaker systems and components, signal processors)

	Dollars[1]
1991	$249,200
1990	248,500
1989	241,000
1988	227,000
1987	215,100
1986	203,900
1985	192,000
1984	181,000
1983	171,000
1982	157,500
1981	175,000[2]
1980	121,000[3]
1979	121,000
1978	108,000
1977	100,000
1976	60,000
1975	53,000
1974	45,000
1973	11,246
1972	10,318

[1] *In thousands of dollars.*
[2] *Includes $18 million of electronic devices previously included in the "Accessories" category.*
[3] *Low estimate according to industry sources.*
Source: Industry estimates.

MUSIC INDUSTRY EXPORT VALUE UP 5%; IMPORT VALUE DOWN 2%

Exports of U.S.-produced musical instruments, parts and accessories rose for the seventh consecutive year in 1991; the 5% increase brought total value of exports to $266,218,000, according to AMC's annual interpretive analysis of U.S. Department of Commerce data.

Total value of musical goods imported to the American market was down 2% in 1991, to $579,491,000.

The continued weakness of the U.S. dollar against foreign currencies was a contributing factor affecting both imports and exports during 1991.

1991 EXPORTS

Combined value of all exported electronic instruments rose 3% to $79.1

1991 U.S. Exports of Musical Instruments and Parts

KEY: *Figures readjusted by AMC to more accurately reflect exports. Harmonized System Numbers for each category appear below each category listing. All values in thousands of dollars.

Category	1991 Units	1991 Value	1990 Units	1990 Value	1989 Units	1989 Value	1991 Leading Customers
Pianos[1] (9201.10000/9201.20000)	9,897*	$ 9,956*	7,292*	$ 8,127*	8,415*	$ 8,027*	Canada
Pipe & Reed Organs (9203.00000)	365*	$ 1,174*	1,888*	$ 1,959*	3,848	$ 2,176	W. Germany
Acoustic Guitars (9202.90300)	83,820	$ 15,757	46,659	$ 13,287	76,422	$ 11,124	Japan
Electric Guitars (9207.90004)	119,733	$ 27,508	63,238	$ 15,151	63,985	$ 14,990	Japan
Other Plucked & Bowed Strings[2] (9202.10000/9202.90600)	140,682	$ 18,066	106,708	$ 17,791	95,990	$ 14,528	Japan
Brasswinds (9205.10000)	66,531	$ 14,170	62,262	$ 14,758	57,426	$ 14,917	Japan
Woodwinds (9205.90100)	112,497	$ 20,391	82,873	$ 17,752	83,811	$ 17,119	Canada/ W. Germany
Percussion (9206.00000)	N/A	$ 16,062	N/A	$ 18,310	N/A	$ 14,758	Japan
Synthesizers, Electric Pianos (9207.10002)	36,685	$ 7,561	71,833	$ 15,153	62,565	$ 11,310	Mexico
Other Electronic Instruments[3] (9207.10008/9207.90008)	702,575	$ 44,029	740,528	$ 46,666	872,328	$ 45,414	U. Kingdom
Harpsichords, Clavichords (9201.90000)	7,387	$ 1,854	8,158*	$ 2,011*	8,432	$ 2,700	U. Kingdom
Other Instruments[4] (9204.10000/9204.20000/9205.90600)	N/A	$ 2,573	N/A	$ 2,866	N/A	$ 3,925	Japan
Fretted & Bowed String Instrs. Parts, Accessories[5] (9209.30000/9209.92000)	N/A	$ 35,455	N/A	$ 31,242	N/A	$ 23,271	Japan
Piano Parts, Accessories[6] (9209.91000)	N/A	$ 8,176	N/A	$ 7,779	N/A	$ 7,203	Mexico
Pipe & Reed Organ Parts, Accessories[7] (9209.93000)	N/A	$ 1,164	N/A	$ 2,632	N/A	$ 2,733	Japan
Electronic Instruments Parts, Accessories[8] (9209.94000)	N/A	$ 13,282	N/A	$ 11,357	N/A	$ 11,137	Japan
Other Instruments Parts, Accessories[9] (9209.99000)	N/A	$ 28,436	N/A	$ 25,562	N/A	$ 17,400	Japan
Other Accessories[10] (9209.10000)	N/A	$ 584	N/A	$ 1,368	N/A	$ 1,675	Japan
TOTALS	N/A	$266,218	N/A	$253,771	N/A	$224,407	

1991 EXPORT FOOTNOTES

[1] *Uprights, Grands, Players. Categories may still contain misclassified instruments.*
[2] *Violins, Violas, Cellos, Basses, Banjos, Mandolins, Ukuleles, Dulcimers, Harps.*
[3] *Other Electronic Keyboards, Electronic Drums, Electronic Wind Instruments, etc. Figures for 1990 and '89 may contain misclassified instruments.*
[4] *Accordions, Mouth Organs, Recorders, Bagpipes, Ocarinas, etc. 1990 U.S. Department of Commerce figure may contain misclassified or "toy" wind instruments.*
[5] *Fretted & Bowed String Instrument Parts and Accessories: Strings, Bridges, Bows, Tuning Pins, etc.*
[6] *Piano Parts & Accessories: Actions, Tuning Pins, Strings, Cut Case Parts, etc.*
[7] *Pipe & Reed Organ Parts & Accessories: Pipes, Reeds, Keyboards, etc.*
[8] *Electronic Instrument (Keyboard, Guitar, Drums, etc.) Parts & Accessories: Body and Case Parts, Frets, Keyboards, etc.*
[9] *Brasswind, Woodwind, Percussion Instrument Parts & Accessories. Also includes parts and accessories for other "musical instruments": Calliopes, Decoy Calls, etc.*
[10] *Metronomes, Tuning Forks, Pitch Pipes.*

million, accounting for 30% (the same percentage as 1990) of all U.S. musical instrument exports.

Electric guitars jumped 89% to nearly 120,000 units valued at $27.5 million (an 82% increase). Japan was the leading customer.

Exported synthesizers/electric piano units dropped 96% and total value was less than half that of the prior year: $7.6 million in 1991, compared to $15.2 million in 1990.

Shipments of other electronic instruments were off 5% in units (to 702,576) and 6% in value (to $44 million).

Exported acoustic guitars posted an 80% unit increase (to 83,800) and were up 19% in value (to $15.8 million). Japan was the leading customer, receiving 67% more units (27,800) than in 1990, with a total value of nearly $7.2 million, a 32% increase.

Total acoustic piano exports were up 36% in units (to 9,900) and 23% in value (to nearly $10 million). Canada was the largest importer of American pianos, receiving 42%

1991 U.S. Imports of Musical Instruments and Parts

KEY: *Figures readjusted by AMC to more accurately reflect exports. Harmonized System Numbers for each category appear below each category listing. All values in thousands of dollars.

Category	1991 Units	1991 Value	1990 Units	1990 Value	1989 Units	1989 Value	1991 Leading Sources
Pianos[1] (9201.10000/9201.20000)	55,145*	$113,735*	64,674*	$ 125,996*	56,339*	$ 114,950*	Japan
Harpsichords, Clavichords (9201.90000)	373*	$ 379*	1,263*	$ 2,452*	3,800	$ 5,621	Japan
Pipe Organs (9203.00400)	67	$ 6,235	85	$ 6,296	352	$ 7,213	Canada
Organs, Not Pipe & Electric (9203.00800)	405*	$ 1,041*	1,941*	$ 1,223*	2,793*	$ 881*	Italy
Violins, Violas, Cellos, Basses (9202.10000)	145,317	$ 10,896	129,438	$ 9,181	143,519	$ 8,184	W. Germany
Acoustic Guitars (9202.902/9202.90400)	440,093	$ 28,592	452,130	$ 23,853	556,000	$ 27,504	S. Korea
Electric Guitars (9207.90004)	272,661	$ 32,656	390,828	$ 38,379	468,284	$ 32,025	Japan
Other Stringed Instruments[2] (9202.90600)	158,801	$ 3,317	200,733	$ 3,249	256,148	$ 3,031	S. Korea
Brasswind Instruments[3] (9205.10008)	26,254*	$ 9,741*	30,836	$ 9,451	36,226	$ 12,482	Japan
Clarinets[4] (9205.90402)	18,213*	$ 4,123*	40,484*	$ 3,841*	29,959	$ 4,384	France
Saxophones (9205.90404)	22,321	$ 7,686	43,111	$ 8,754	51,071	$ 12,057	Taiwan
Other Wind Instruments[5] (9205.90406/9205.90408/9205.90600)	307,521*	$ 6,213*	1,459,367	$ 6,553	1,619,638	$ 6,859	Japan
Percussion Instruments[6] (9206.00200/9206.00400/9206.00800)	N/A	$ 30,998	N/A	$ 36,514	N/A	$ 35,504	Taiwan
Electronic Keyboards (1+ Keyboards)[7] (9207.100045/9207.100055)							
Under $200:	2,071	$ 30	7,532	$ 363	22,047	$ 511	
$200 and over:	22,052	$ 22,172	22,443	$ 20,800	17,071	$ 15,388	
	24,123	$ 22,202	29,975	$ 21,163	39,118	$ 15,899	Japan
Electronic Keyboards (1 Keyboard) & Other[8] (9207.100065/9207.100075)							
Under $100:	1,581,275*	$ 61,070*	1,067,916	$ 36,550	2,380,689	$ 76,310	
$100 and over:	326,177	$ 94,477	366,452	$ 98,830	444,093	$101,161	
	1,907,452	$155,547	1,434,368	$135,380	2,824,782	$177,471	Japan
Synthesizers (Keyboard Type)[9] (9207.100005/9207.100010)							
Under $100:	150,888	$ 1,073	75,964	$ 1,069	120,638	$ 1,424	
$100 and over:	26,931	$ 15,980	47,596	$ 25,823	68,132	$ 35,762	
	177,819	$ 17,053	123,560	$ 26,892	188,770	$ 37,186	Japan
Hand-Held Electronic Instruments[10] (9207.10006)	143,919	$ 2,728	236,189	$ 1,702	219,395	$ 2,686	Japan
Other Electronic Instruments[11] (9207.90008)	232,648	$ 9,109	409,368	$ 14,010	406,189	$ 14,211	Japan
Accordions, Concertinas (9204.10400/9204.10800)	6,731*	$ 1,492*	6,058*	$ 1,353*	10,485*	$ 1,481*	Italy
Mouth Organs[12] (9204.20000)	219,093	$ 4,545	183,535	$ 4,528	202,488	$ 4,054	W. Germany
Instrument Strings[13] (9209.30000)	N/A	$ 4,770	N/A	$ 4,751	N/A	$ 3,483	Austria

continued on page 16

of all units accounting for 53% of the category's total value.

Exported woodwind instruments rose 36% in units (to 112,500), and 15% in value (to $20.4 million). The two leading customers—Japan and Canada—accounted for 39% of the total value and 33% of all units in this category. Brasswinds were reported up 7% in units (to 66,500), but down 4% in value (to $14.2 million). Japan replaced Canada as the leading customer (in terms of total value), importing brasswinds valued at slightly more than $2.8 million, a 19% increase over 1990.

Total value of exported percussion instruments was down 14% (to $16.1 million), with Japan the leading customer. The Other Plucked and Bowed Strings category rose 32% in units (to 140,700) valued at $18.1 million (a 2% increase).

1991 IMPORTS

Electronic keyboards (with one keyboard) remained the leading import category with a total dollar value of $155.5 million; a 15% increase over 1990. Imported synthesizer (keyboard type) units were up 44% (to 177,819) in 1991; total value dropped 58% to approximately $17.1 million. Hand-held electronic instruments were down 64% in units and up 60% in value during 1991.

Electric guitars posted a 43% drop in units (to 272,700), with a total value of nearly $32.7 million; an 18% decrease. Japan replaced South Korea as the leading source, importing 8% more units than in 1990, valued at more than $15 million, a 16% increase.

Acoustic pianos (the second largest import category in terms of total value) were reported at $113.7 million; an 11% decrease from the previous year. Unit shipments were down 17% (to 55,145). Imported verticals represented 56% of total acoustic piano units shipped (the same percentage as 1990), and 32% of total value. Grands were down 13% in units (to 23,300) and off 16% in value (to $77.4 million).

Imported acoustic guitar units were down 3% (to 440,000) valued at nearly $28.6 million; an 11% increase over 1990. Guitars Not Valued Over $100 were down 15% in units and 19% in value. Guitars Valued At $100 and Over were up 73% in units and 60% in value.

Imported saxophones dropped 93% in units (to 22,300) and were off 14% in value (to $7.7 million). Brasswind instruments were reported down 17% in units and up 3% in value (to $9.74 million), compared to $9.45 million in 1990; clarinets were down by more than half of the previous year's units (18,200 units in 1991, compared to 40,480 in 1990), but rose 7% in value. Units in the Other Wind Instrument category were reported at four and a half times less than 1990 (307,500 units in 1991 compared to 1,459,400 units in 1990), valued at $6.2 million (a 5% increase). Violins, violas, etc., rose 12% in units and 19% in total value. Percussion instruments, the largest total value category in this group, were down 18% to $31 million.

1991 U.S. Imports of Musical Instruments and Parts *continued*

Category	1991 Units	1991 Value	1990 Units	1990 Value	1989 Units	1989 Value	1991 Leading Sources
Piano Parts, Accessories[A] (9209.91400/9209.91800)	N/A	$ 21,294	N/A	$ 18,887	N/A	$ 19,345	Japan
Organ Parts, Accessories[B] (9209.93400/9209.93800)	N/A	$ 8,820	N/A	$ 8,965	N/A	$ 9,554	U. Kingdom
Fretted & Bowed String Instrs. Parts, Accessories[C] (9209.92200/9209.92400/9209.2600/9209.92800)	N/A	$ 17,224	N/A	$ 15,477	N/A	$ 12,003	Mexico
Woodwind/Brass Instrument Parts, Accessories[D] (9209.99404/9209.99408)	N/A	$ 16,174	N/A	$ 17,630	N/A	$ 15,997	Japan
Percussion Instrument Parts, Accessories[E] (9209.99100)	N/A	$ 11,143	N/A	$ 12,415	N/A	$ 13,245	Taiwan
Electronic Instrument Parts, Accessories[F] (9209.94800/9209.94400)	N/A	$ 22,662	N/A	$ 20,951	N/A	$ 27,485	Japan
Other Instruments Parts, Accessories[G] (9209.99800)	N/A	$ 5,520	N/A	$ 6,326	N/A	$ 5,034	Japan
Other Accessories[H] (9209.10000)	N/A	$ 3,596	N/A	$ 3,786	N/A	$ 2,939	S. Korea
TOTALS	N/A	$579,491	N/A	$591,958	N/A	$632,768	

1991 IMPORT FOOTNOTES

[1] *Uprights & Grands.*
[2] *Banjos, Ukuleles, Mandolins & Other Fretted Instruments.*
[3] *Over $10 in value.*
[4] *May contain misclassified instruments.*
[5] *Flutes, Piccolos, Oboes, English Horns, Recorders, etc.*
[6] *Cymbals, Drums, Marimbas, Castanets, Triangles, etc.*
[7] *May contain misclassified instruments.*
[8] *May contain misclassified instruments.*
[9] *May contain misclassified instruments.*
[10] *Statistics as reported by U.S. Department of Commerce. May contain misclassified instruments.*
[11] *Instruments requiring amplification. Electronic Drums, Rhythm Machines, Electronic Wind Instruments, etc. Figures for 1988-90 may contain misclassified instruments.*
[12] *All totals in dozens.*
[13] *Strings for Bowed String and Fretted Instruments.*
[A] *Piano Parts and Accessories: Actions, Tuning Pins, Hammers, Strings, Cut Case Parts, etc.*
[B] *Organ Parts and Accessories: Pipes, Reeds, etc.*
[C] *Fretted and Bowed String Instrument Parts and Accessories: Bridges, Bows, Tuning Pins, etc.*
[D] *Brass and Woodwind Instrument Parts and Accessories: Mouthpieces, Horn Bells, Key Fittings, etc.*
[E] *Percussion Instrument Parts and Accessories: Mutes, Pedals, Dampers, etc.*
[F] *Electronic Instrument Parts and Accessories (for keyboard, electronic drum, electronic wind, etc.): Body and Case Parts, Frets, Keyboards, etc.*
[G] *Parts and Accessories for Other Instruments: Recorders, Accordions, Concertinas, etc.*
[H] *Metronomes, Tuning Forks and Pitch Pipes.*

Source: U.S. Dept. of Commerce, Bureau of Census, Foreign Trade Division

During 1991, total net sales of musical instruments, printed music, accessories and related products were down 1.4% compared to 1990, as reported by music retailers around the U.S. who participated in the National Association of Music Merchants (NAMM) ongoing survey. Data is analyzed monthly by Industry Insights, Inc. of Columbus, Ohio.

Sales of all acoustic pianos in 1991 were down 8.7%; sales of both vertical and grand pianos dropped 5.8%.

Organs posted a 10.2% gain, digital pianos rose 6.5%, and synthesizers and portable keyboards were off 19%.

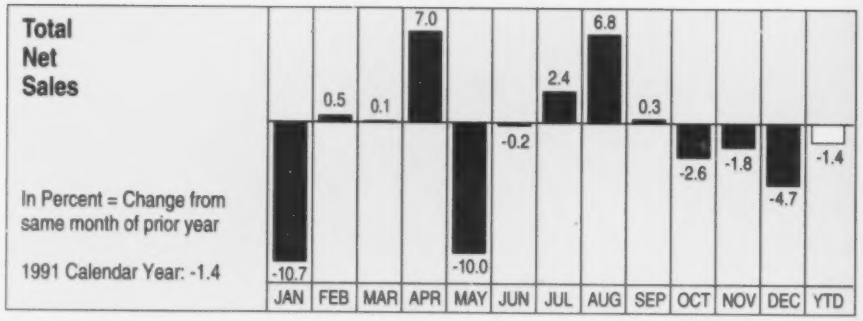
Band and orchestra instruments were up 8.6% and percussion instruments were down 2.6%.

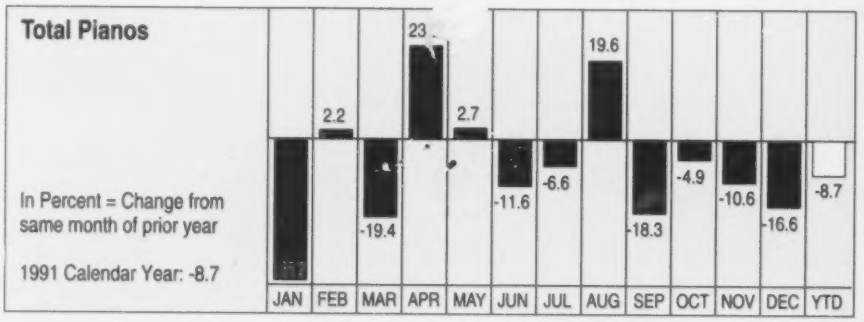
Fretted instruments showed a 3.3% gain, instrument amplifiers dropped 3.5%, signal processing and effects devices moved ahead 1% and sound reinforcement was up 0.3%.

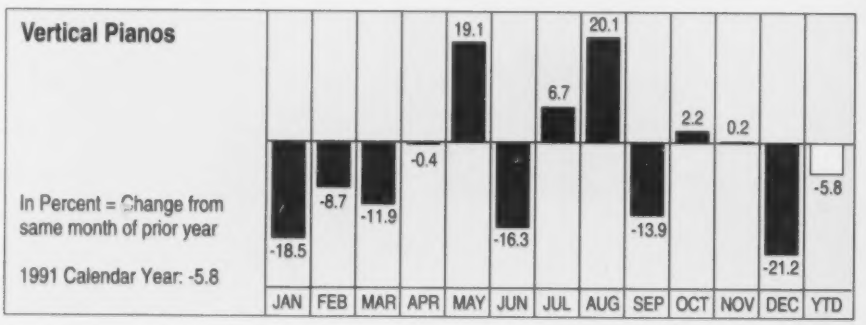
Printed music sales were off slightly by 0.1% and accessories rose 1.5%.

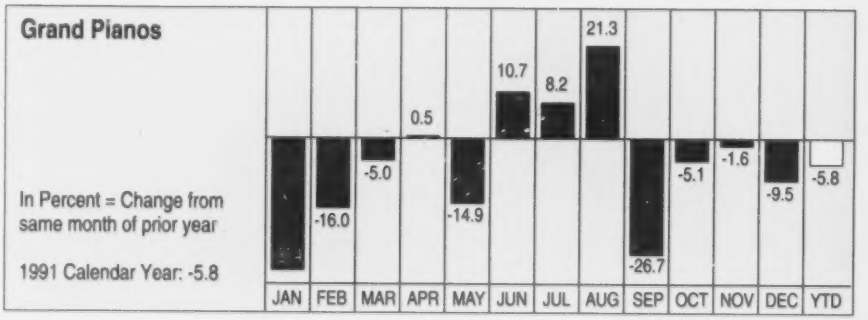
How to Read the Charts: On each of the following charts, 1991 total net sales in each product category are shown as the percentage of change from the same month of the prior year. It should be noted that dollar information has not been adjusted for inflation.

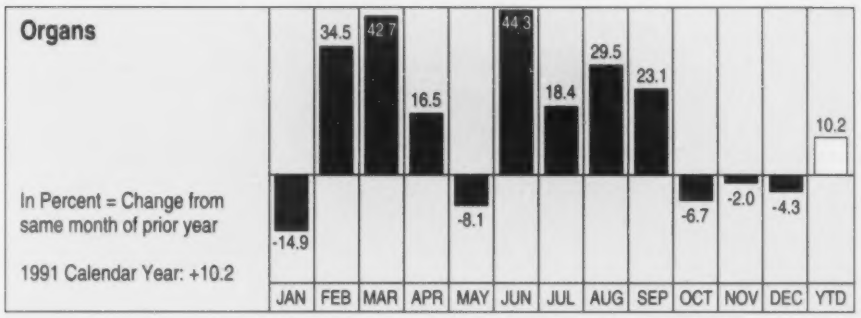
Further information about this music retailer survey is available from the National Association of Music Merchants, 5140 Avenida Encinas, Carlsbad, California 92008.

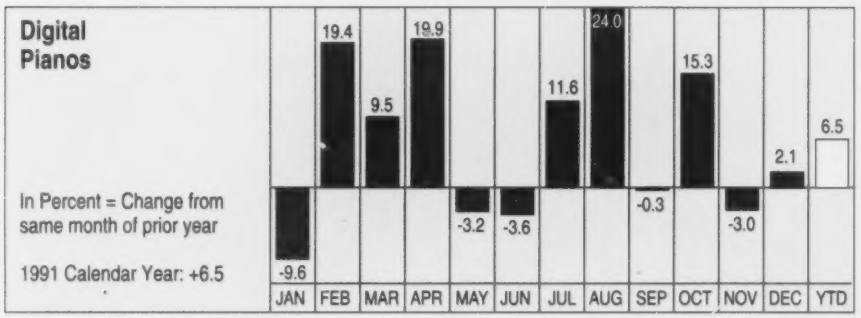


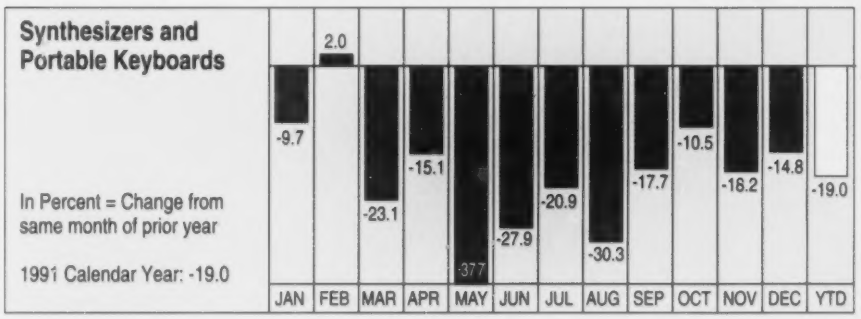


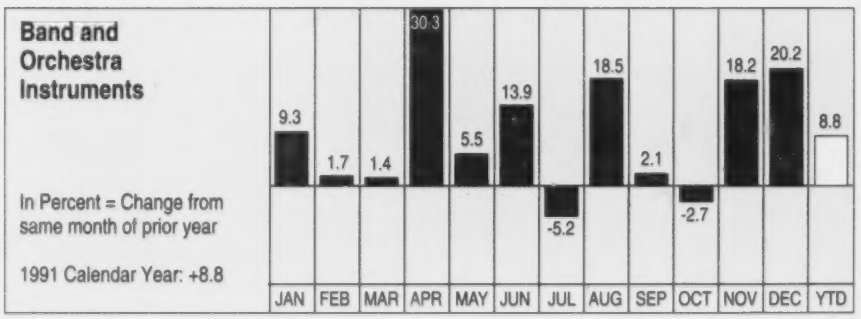


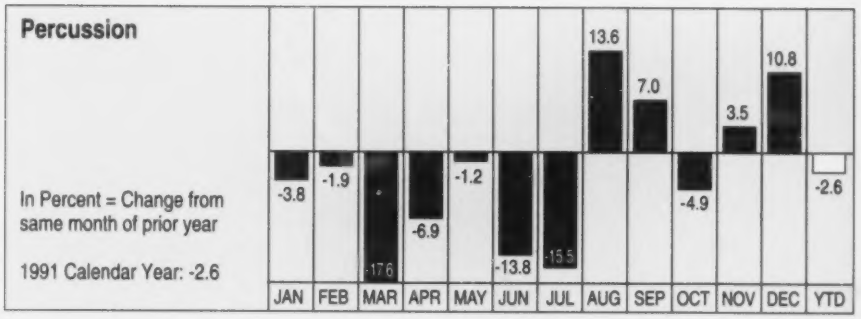



Organs
In Percent = Change from same month of prior year
1991 Calendar Year: +10.2
-14.9
34.5
42.7
16.5
-8.1
44.3
18.4
29.5
23.1
-6.7
-2.0
-4.3
10.2
JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC YTD


Digital Pianos
In Percent = Change from same month of prior year
1991 Calendar Year: +6.5
-9.6
19.4
9.5
19.9
-3.2
-3.6
11.6
24.0
-0.3
15.3
-3.0
2.1
6.5
JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC YTD


Synthesizers and Portable Keyboards
In Percent = Change from same month of prior year
1991 Calendar Year: -19.0
-9.7
2.0
-23.1
-15.1
-37.7
-27.9
-20.9
-30.3
-17.7
-10.5
-18.2
-14.8
-19.0
JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC YTD


Band and Orchestra Instruments
In Percent = Change from same month of prior year
1991 Calendar Year: +8.8
9.3
1.7
1.4
30.3
5.5
13.9
-5.2
18.5
2.1
-2.7
18.2
20.2
8.8
JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC YTD


Percussion
In Percent = Change from same month of prior year
1991 Calendar Year: -2.6
-3.8
-1.9
-17.6
-6.9
-1.2
-13.8
-15.5
13.6
7.0
-4.9
3.5
10.8
-2.6
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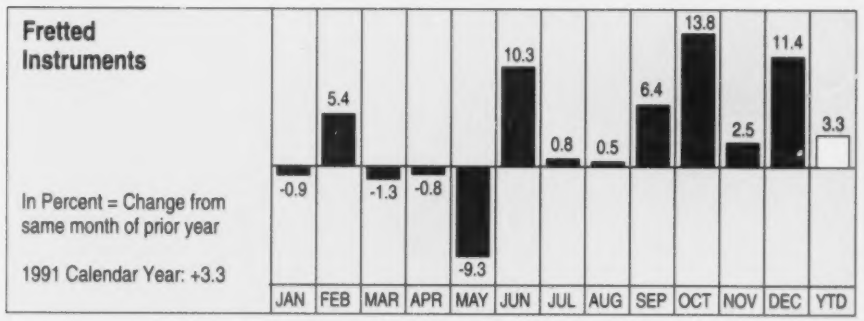
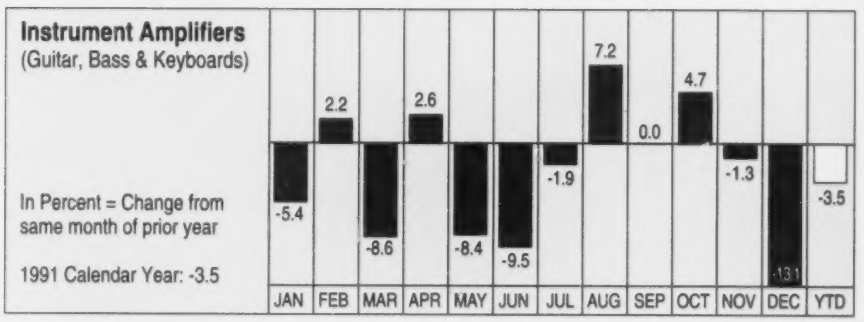
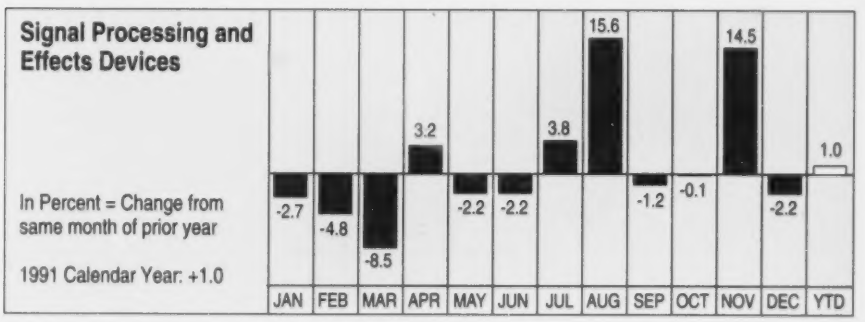
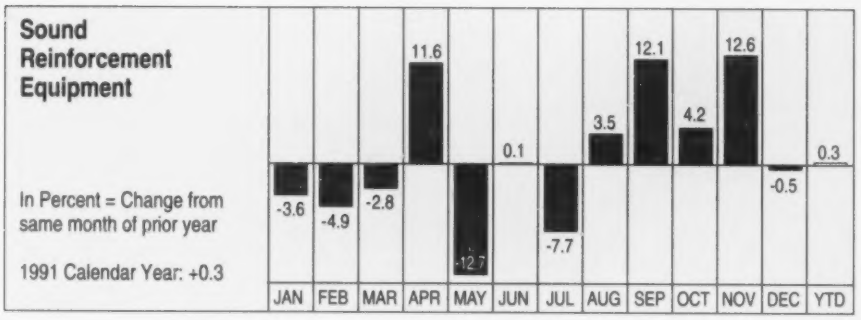

Fretted Instruments
In Percent = Change from same month of prior year
1991 Calendar Year: +3.3
-0.9
5.4
-1.3
-0.8
-9.3
10.3
0.8
0.5
6.4
13.8
2.5
11.4
3.3
JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC YTD


Instrument Amplifiers
(Guitar, Bass & Keyboards)
In Percent = Change from same month of prior year
1991 Calendar Year: -3.5
-5.4
2.2
-8.6
2.6
-8.4
-9.5
-1.9
7.2
0.0
4.7
-1.3
-13.1
-3.5
JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC YTD


Signal Processing and Effects Devices
In Percent = Change from same month of prior year
1991 Calendar Year: +1.0
-2.7
-4.8
-8.5
3.2
-2.2
-2.2
3.8
15.6
-1.2
-0.1
14.5
-2.2
1.0
JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC YTD


Sound Reinforcement Equipment
In Percent = Change from same month of prior year
1991 Calendar Year: +0.3
-3.6
-4.9
-2.8
11.6
-12.7
0.1
-7.7
3.5
12.1
4.2
12.6
-0.5
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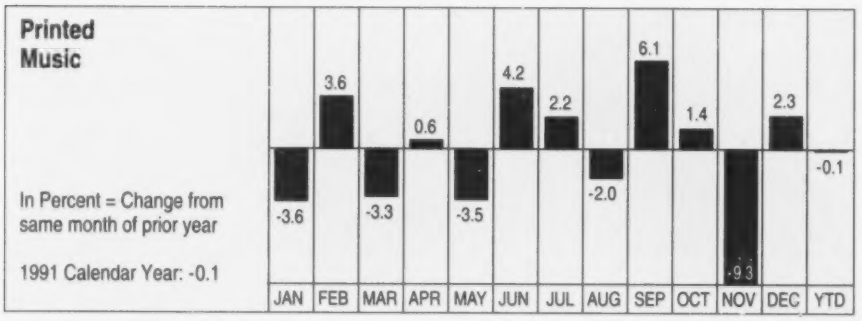
Printed Music
In Percent = Change from same month of prior year
1991 Calendar Year: -0.1
-3.6
3.6
-3.3
0.6
-3.5
4.2
2.2
-2.0
6.1
1.4
-9.3
2.3
-0.1
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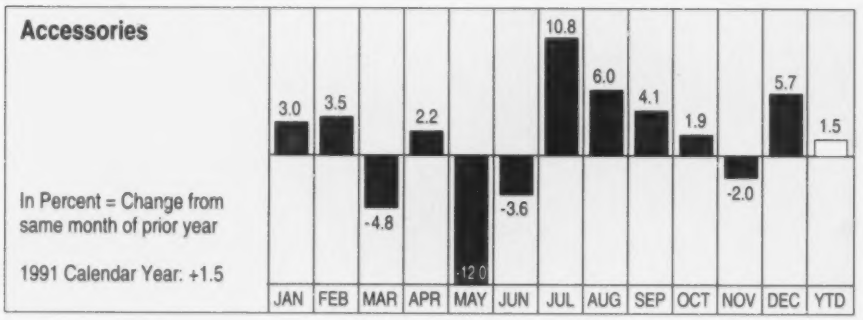
Accessories
In Percent = Change from same month of prior year
1991 Calendar Year: +1.5
3.0
3.5
-4.8
2.2
-12.0
-3.6
10.8
6.0
4.1
1.9
-2.0
5.7
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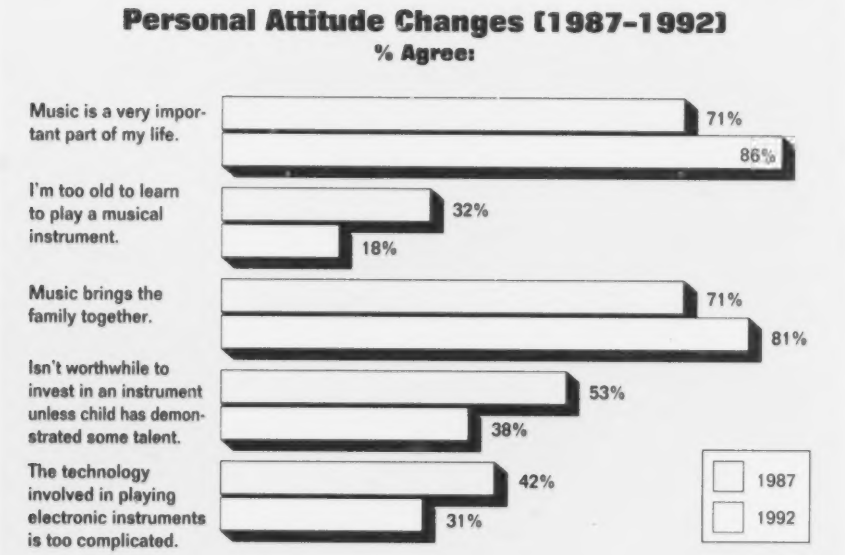
Updated AMC Survey Finds American Adults Positive Toward Music Participation, Music Education for Children



Source: 1987 and 1992 AMC Surveys

Adults in the U.S. tend to view music as an important, enriching part of their lives and agree that children should have some experience with music and musical instruments, according to a new update of the American Music Conference's 1987 benchmark survey of adults' attitudes toward music participation and music education.

Eighty-five percent of the adults surveyed agree that schools should offer instrumental music instruction as part of their regular curriculum, and 82% believe that communities should provide financial support for music education in their schools.

These and other insights into adults' attitudes were revealed by the survey, which was underwritten by the National Association of Music Merchants (NAMM) and conducted for AMC by Research & Forecasts, Inc., New York. The 500+ respondents participating in this nationwide survey are not members of a regularly surveyed, captive research panel, nor are they paid respondents. Therefore, responses from participants can be projected to the entire U.S. adult population age 18 years and older.

Highlights of the survey are contained in this issue of *Music USA*. A complete written report of survey findings is available from AMC.

Attitudes Toward Adult Music Participation

Eighty-six percent of the adults responding to the survey said music is an important part of their lives, whether they play a musical instrument or not. Nine out of ten of these people voiced positive attitudes toward instrumental music by agreeing with the statement that "playing a musical instrument is something you'll always be glad you learned to do." And 71% of the adults wished they had learned to play a musical instrument, while nearly

three-quarters said they would like to learn to play.

What are the reasons adults play musical instruments? The top five reasons cited by survey respondents were that playing an instrument:

- is fun
- provides a sense of personal accomplishment
- makes them feel good about themselves
- is relaxing
- makes them appreciate music more

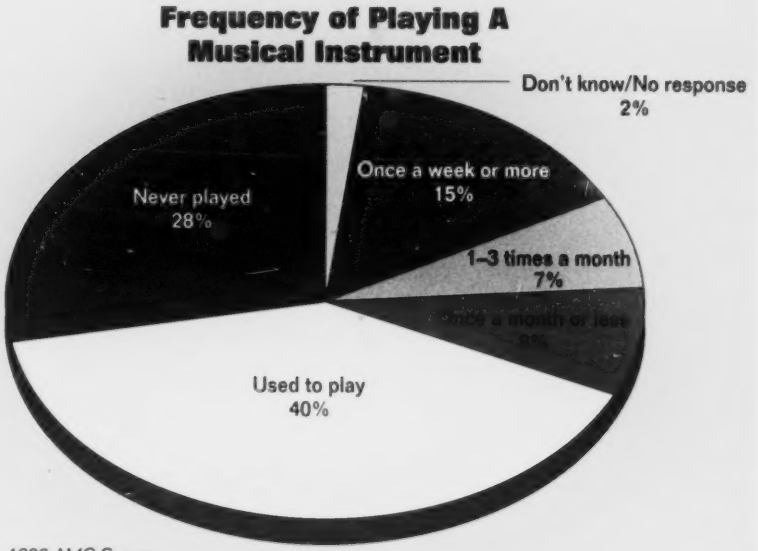
Attitudes Toward Children's Music Participation

Survey respondents were in near universal agreement that music is worthwhile, and that they are willing to encourage children's musical development.

The reasons for encouraging a child's musical development are many, ranging from creativity and self-expression to discipline and sociability. Ninety-six percent agree learning to play a musical instrument provides children with "a sense of accomplishment" and "self-expression." But perhaps adults' attitudes about children learning music is best summed up in the simple statement that 94% of the respondents agree with: "it's fun."

A majority of respondents believe children should get an early start in music education, agreeing that instrumental and vocal music should begin in elementary school; 59% also believe elementary school children should receive music appreciation lessons.

Among adults, the main barrier to a child's learning to play an instrument is "it's hard to get children to practice," cited by 61% of all respondents. Four in ten adults also cited the difficulty of finding a good music teacher. Almost no one thinks music interferes with other childhood activities, and only 17% of respondents believe music "takes time away from more important things."


Frequency of Playing A Musical Instrument
Don't know/No response 2%
Once a week or more 15%
Never played 28%
1–3 times a month 7%
Used to play 40%

Source: 1992 AMC Survey

Music in School

	Agree
All schools should offer instrumental music instruction as part of the regular curriculum.	85%
Communities should provide financial support for music education programs in their schools.	82%

Source: 1992 AMC Survey

Changes In Personal Attitudes (1987-1992)

Compared with the 1987 AMC survey, even more Americans agree today that music is an important, integral part of their lives. Eighty-six percent agree "music is a very important part of my life" (compared with 71% in 1987) and that "music brings the family together (81% vs. 71%).

In 1987, over three in ten respondents thought they were "too old" to learn to play an instrument; in 1992 that figure has dropped to 18%.

CHANGES IN ATTITUDES TOWARD CHILDREN & MUSIC (1987-1992)

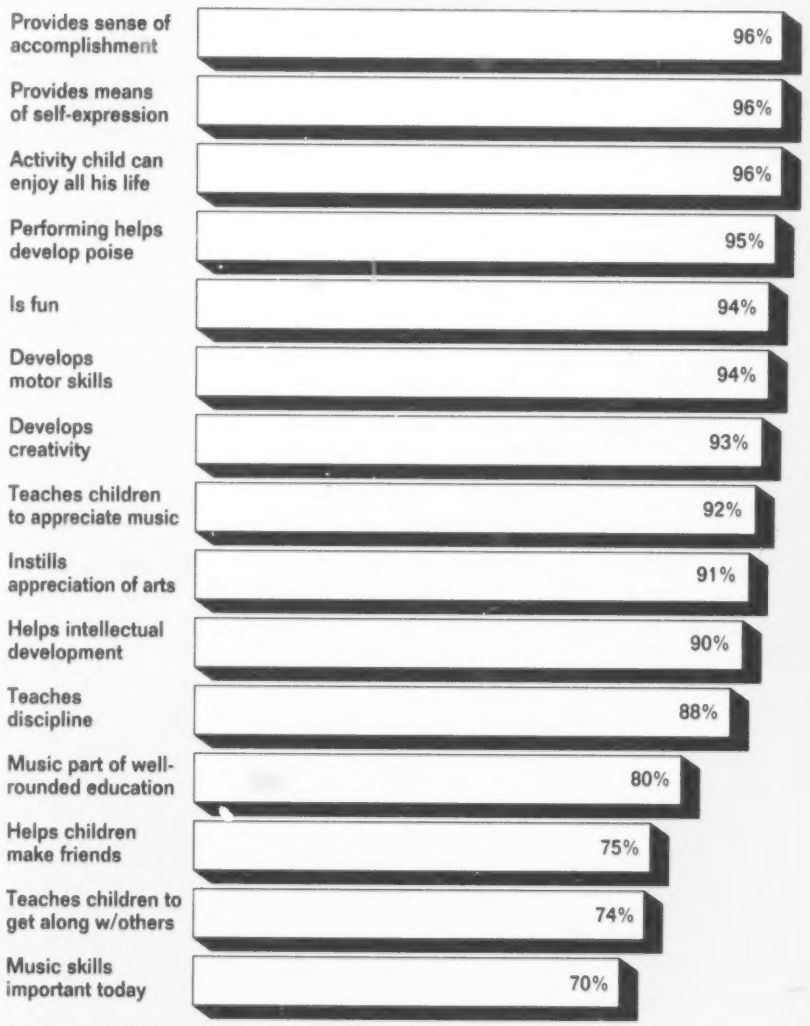
The 1992 survey respondents were significantly more likely than those in 1987 to report several reasons they *definitely* felt it was important for children to play musical instruments. Over 10% more in 1992 chose the following reasons: "provides sense of accomplishment," "develops poise and confidence," "provides another means of self-expression," "develops child's creativity," and "overall intellectual development."

ADDITIONAL HIGHLIGHTS

Other highlights of findings from the 1992 adult attitude survey include:

- The top five most popular types of instruments (among adult survey respondents who play) are the acoustic piano (played by 37%); an electronic instrument, such as a portable keyboard, synthesizer, or electric piano (played by 31%); acoustic guitar (27%); woodwind instruments (18%), and electric guitar (12%). The top five most popular instruments played by someone else in respondents' households are acoustic piano (33%); woodwinds (31%); electronic keyboards or synthesizers (28%); acoustic guitar (18%); and brass instruments (13%).
- One-quarter of Americans have never played an instrument, while 4 in 10 "used to play." Of those who do play, 30% play at least sometimes, with 15% of those playing more than once a week.
- Americans agree that although expensive and "not the real thing," computers have their place in the field of music education. Seventy-five percent of the survey respondents agree using a computer can help "students grasp concepts quicker;" 64% agree computers will "take the difficulty out of learning," and 57% agree computers may "take the drudgery out of practicing." However, the adults surveyed also believe a student can learn more from the interaction with a "real, human teacher" (68%) and "no computer will ever sound as good as a real instrument (52%)."

Reasons a Child Should Learn to Play A Musical Instrument



Source: 1992 AMC Survey

DIRECTORY OF MUSIC-RELATED ASSOCIATIONS AND ORGANIZATIONS

(TRADE, EDUCATOR, RELIGIOUS, FRATERNAL, SERVICE, AND OTHER)

Please Note: For easier reference, directory listings under each category are alphabetical by *key* words, i.e. piano, singing, flute, etc.

TRADE

AMERICAN FEDERATION OF MUSICIANS
1501 Broadway Suite 600
New York, NY 10036
(212) 869-1330
Represents recording, television, movie, symphony and other professional musicians.

NATIONAL ASSOCIATION OF BAND INSTRUMENT MANUFACTURERS
136 W. 21st St., 3rd Fl.
New York, NY 10011-3212
(212) 924-9175
Promotes, encourages and fosters education and participation in band and orchestra instruments.

NATIONAL ASSOCIATION OF PROFESSIONAL BAND INSTRUMENT REPAIR TECHNICIANS
8 Ardith Dr.
Normal, IL 61761
(309) 452-4257
Provides forum for exchange of ideas and implements code of professional ethics.

RETAIL SHEET MUSIC DEALERS ASSOCIATION
4020 McEwen, Suite 105
Dallas, TX 75244-5019
(214) 233-9107
Promotes sheet music dealer/publisher relations; encourages music education, and provides common ground for exchange of ideas.

NATIONAL ASSOCIATION OF SCHOOL MUSIC DEALERS
4020 McEwen, Suite 105
Dallas, TX 75244-5019
(214) 233-9107
Services the musical needs of schools at all levels.

MUSIC ACHIEVEMENT COUNCIL
5140 Avenida Encinas
Carlsbad, CA 92008
(619) 438-8001
A joint council of the National Association of Music Merchants and National Association of Band Instrument Manufacturers dedicated to the retention of students in school band and orchestra programs.

MUSIC DISTRIBUTORS ASSOCIATION
136 W. 21st St.
New York, NY 10011-3212
(212) 924-9175
Association for musical instrument and accessory wholesalers, importers, or manufacturers.

INTERNATIONAL ASSOCIATION OF ELECTRONIC KEYBOARD MANUFACTURERS
136 W. 21st St., 3rd Fl.
New York, NY 10011-3212
(212) 924-9175
Association for electronic keyboard manufacturers.

CREATIVE AUDIO AND MUSIC ELECTRONICS ORGANIZATION
Route 2, Box 408
Meridian, MS 39305
(601) 485-7218
Represents professional audio and music electronics manufacturers and distributors.

GUITAR & ACCESSORIES MUSIC MARKETING ASSOCIATION
136 W. 21st St.
New York, NY 10011-3212
(212) 924-9175
Association for fretted instrument and/or related accessory manufacturers, distributors and others.

NATIONAL COUNCIL OF MUSIC IMPORTERS & EXPORTERS
136 W. 21st St.
New York, NY 10011
(212) 924-9175
Association for musical instrument and accessory importers and exporters; publishes import/export statistics, trade show and tariff schedules, and newsletters reporting worldwide government activities affecting international trade.

GUILD OF AMERICAN LUTHIERS
8222 S. Park Ave.
Tacoma, WA 98408
(206) 472-7853
Information exchange network for stringed instrument builders and repairers. Publishers of American Lutherie; instrument blueprints and biennial conventions.

NATIONAL ASSOCIATION OF MUSIC MERCHANTS
5140 Avenida Encinas
Carlsbad, CA 92008
(619) 438-8001, (800) 767-6266
Represents retailers, manufacturers and distributors of musical instruments, professional audio equipment and related music accessories. Also provides variety of educational, market development and support services, including management of two annual trade exhibitions.

INTERNATIONAL MIDI ASSOCIATION
5316 W. 57th St.
Los Angeles, CA 90056
(213) 649-6434
International MIDI (Musical Instrument Digital Interface) information network and official distributor of the MIDI 1.0 Detailed Specification.

INTERNATIONAL ASSOCIATION OF PIANO BUILDERS & TECHNICIANS
4510 Belleview, Suite 100
Kansas City, MO 64111
(816) 753-7747
International association for piano technicians.

PIANO MANUFACTURERS ASSOCIATION INTERNATIONAL
4020 McEwen, Suite 105
Dallas, TX 75244-5019
(214) 233-9107
Association representing the acoustic piano industry.

PIANO TECHNICIANS GUILD, INC.
4510 Belleview, Suite 100
Kansas City, MO 64111
(816) 753-7747
Association for technicians specializing in tuning, maintenance, repair and rebuilding of fine pianos. Provides examinations for Registered-Tuner-Technician (RTT).

NATIONAL MUSIC PUBLISHERS ASSOCIATION
205 E. 42nd St.
New York, NY 10017
(212) 370-5330
Association representing the music publishing industry.

EDUCATOR/SCHOOLS

ASSOCIATION OF PERFORMING ARTS PRESENTERS
1112 16th St., NW (#620)
Washington, DC 20036
(202) 833-2787
Professional association/service organization for performing arts presenting organizations.

COLLEGE BAND DIRECTORS NATIONAL ASSOCIATION
Box 8028
University of Texas
Austin, TX 78713
(512) 471-5883
Supports and promotes growth of member musicians, educators, conductors and administrators.

AMERICAN SCHOOL BAND DIRECTORS ASSOCIATION
P.O. Box 146
Otsego, MI 49078
(616) 694-2092
Promotes the advancement and improvement of elementary and secondary school instrumental music instruction.

AMERICAN COLLEGE OF MUSICIANS
808 Rio Grande
Austin, TX 78767
(512) 478-5775
Promotes music education with established standardized curriculum for piano teachers and students.

COLLEGE MUSIC SOCIETY
P.O. Box 18000
Boulder, CO 80308-8000
(303) 449-1611
Organization for college music teachers which gathers and disseminates information and ideas on music in higher education.

NATIONAL ASSOCIATION OF COLLEGE WIND & PERCUSSION INSTRUCTORS
Division of Fine Arts
Northeast Missouri State University
Kirksville, MO 63501
(816) 785-4442
Provides communications forum for college, university and conservatory wind and percussion teachers.

MUSIC EDUCATORS NATIONAL CONFERENCE
1902 Association Dr.
Reston, VA 22091
(703) 860-4000
Educational association dedicated to advancement of all aspects of music education in the schools from pre-kindergarten through graduate studies. Membership includes teachers, administrators, music supervisors.

MUSIC INDUSTRY CONFERENCE
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1902 Association Dr.
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Auxiliary organization of the Music Educators National Conference which serves the mutual interests of the industry and educators through exchange of ideas, development of code of ethics, and maintenance of the highest level of business procedures at conventions and in advertising and all relations with the public.

ORGANIZATION OF AMERICAN KODALY EDUCATORS
Music Department
Nicholls State University
Box 2017
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(504) 448-4602
Organization for public and private teachers, students, administrators and others who support the Kodaly teaching method.

NATIONAL GUILD OF COMMUNITY MUSIC SCHOOLS
40 N. Van Brunt St., Suite 32
Englewood, NJ 07631
(201) 871-3337
Association of nonprofit, nondegree community schools of the arts that offer instruction to people of all ages and ability.

NATIONAL SCHOOL ORCHESTRA ASSOCIATION
345 Maxwell Dr
Pittsburgh, PA 15236
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Supports elementary, junior and senior high school and university instrumental music teachers dedicated to development of school orchestra programs.

COUNCIL FOR RESEARCH IN MUSIC EDUCATION
1205 W. California
Urbana, IL 61801
(217) 333-1027
Organization for scholars and institutions interested in advancing the cause of research in music teaching and learning.

NATIONAL ASSOCIATION OF SCHOOLS OF MUSIC
11250 Roger Bacon Dr., Suite 21
Reston, VA 22090
(703) 437-0700
Provides accreditation, statistical services, policy analysis and administrative development for programs preparing professional musicians, teachers and music services personnel.

NATIONAL COUNCIL OF STATE SUPERVISORS OF MUSIC
c/o Jeffrey Patchen
Department of Education
State House 229
Indianapolis, IN 46204
(317) 232-9157
Advisory body to the National Association of Music Educators' National Executive Board with membership open to anyone responsible for music in a state or territory department of education and a member of MENC. Goal is to develop and strengthen music education in the U.S. and its territories.

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UGA Station Box 2066,
Athens, GA 30612-0066
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Promotes and encourages professional and amateur string (including guitar and harp) and orchestra study, performance, teacher education, research and pedagogy.

SUZUKI ASSOCIATION OF THE AMERICAS
P.O. Box 354
Muscatine, IA 52761-0354
(319) 263-3071
Organization of teachers, parents and educators interested in and dedicated to advancement of the Suzuki Method in the western hemisphere.

MUSIC TEACHERS NATIONAL ASSOCIATION
617 Vine St., Suite 1432
Cincinnati, OH 45202-2434
(513) 421-1420
Organization serving music teachers in studios, conservatories, music schools, public and private schools and institutions of higher learning.

WOMEN BAND DIRECTORS NATIONAL ASSOCIATION
344 Overlook Dr.
West Lafayette, IN 47906
(317) 463-1738
Provides encouragement for young women entering the instrumental music field and develops comprehensive music and education programs beneficial to women band directors and their students.

RELIGIOUS

NATIONAL CATHOLIC BANDMASTERS ASSOCIATION
Box 948
Notre Dame, IN 46556
(219) 239-7136
Organization representing Catholic school instrumental music teachers which promotes qualitative & quantitative growth of Catholic school band programs.

CHRISTIAN INSTRUMENTAL DIRECTORS ASSOCIATION
P.O. Box 601
Cedarville, OH 45314
Designed to meet the needs of private, church-related school band and/or orchestra directors and church music directors interested in using instruments in worship.

STANDING COMMISSION ON CHURCH MUSIC OF THE EPISCOPAL CHURCH
815 Second Ave.
New York, NY 10017
(212) 867-8400
Undertakes research and development of musical resources (eg. hymnals), guidelines and educational materials for Episcopal liturgical music.

PRESBYTERIAN ASSOCIATION OF MUSICIANS
1000 E. Morehead St.
Charlotte, NC 28204
(No Telephone)
Association which cooperates with Presbyterian Church (USA) agencies and offers assistance in worship, music and the arts.

UNITARIAN UNIVERSALIST MUSICIANS' NETWORK
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(301) 762-4219
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administered by Chorus America
2111 Sansom St.
Philadelphia, PA 19103
(215) 563-2430
Promotes research into performances of established choral works and discovery of unpublished, unknown choral works. Publisher of *The American Choral Review & Research Memorandum Series*.

INTERNATIONAL FEDERATION FOR CHORAL MUSIC
College of Music CB301
University of Colorado
Boulder, CO 80309-0301
(303) 492-8314
Association of choral organizations and individuals dedicated to fostering choral music and activities throughout the world.

NATIONAL ASSOCIATION OF COMPOSERS/USA
P.O. Box 49652, Barrington Station
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Dedicated to improving the social and political status of American composers, the preservation of music and dissemination of American composition information and news.

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(712) 784-3001
Works to restore acoustic country, bluegrass, folk, hillbilly, mountain, western, ragtime and honkytonk music to the international stage.

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1889 F St., NW, 230-C
Washington, DC 20006
(202) 458-3158
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INTERNATIONAL COUNCIL FOR TRADITIONAL MUSIC
Department of Music
Columbia University
New York, NY 10027
(212) 678-0332
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NATIONAL JAZZ SERVICE ORGANIZATION
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NATIONAL ORCHESTRAL ASSOCIATION
475 Riverside Dr, Suite 249
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2511 55th St.
Boulder, CO 80301
(303) 447-1572
Steve Cunningham
Manufacturer of computer-based audio equipment

THE WELK MUSIC GROUP
1299 Ocean Ave., Suite 800
Santa Monica, CA 90401
(213) 870-1582
Dean Kay, Exec. V.P. & Gen. Mgr.
Music publisher

WERLEIN'S FOR MUSIC
3750 Veterans Blvd.
Metairie, LA 70002
(504) 883-5060
Bitsie Werlein, President
Retailer

WEST MUSIC COMPANY
1212 5th St.
Coralville, IA 52241
(319) 351-2000
Stephen West, President
Retailer/wholesaler

WESTERN ILLINOIS UNIVERSITY
Department of Music
Macomb, IL 61455
(217) 236-1545
Ann Collins, Chairman
Educational institution offering a Bachelor of Arts degree in music merchandising

THE WOODWIND AND THE BRASSWIND & THE GENERAL MUSIC STORE
19880 State Line Rd.
South Bend, IN 46637
(219) 272-8266
Dennis Bamber, President
Supplier of instruments, mouthpieces, accessories, percussion, electronics, gift items and apparel for elementary, secondary, college and professional performers

WORD MUSIC
5221 N. O'Connor Blvd., Suite 1000
Irving, TX 75039
(214) 556-1900
Don Cason, Vice President
Music publisher

E.U. WURLITZER MUSIC & SOUND, INC.
922 Commonwealth Ave.
Boston, MA 02215
(617) 738-7000
Eugene Joly, President
Retailer

YAMAHA CORP. OF AMERICA
6600 Orangethorpe Ave.
Buena Park, CA 90622
(714) 522-9011
Ron Raup, Senior Vice President
Manufacturer/marketer of a variety of musical instruments

YOUNG CHANG AMERICA, INC.
13336 Alondra Blvd.
Cerritos, CA 90701
(213) 926-3200
David Cho, President
Lloyd Robbins, Vice President
Manufacturer

ZESWITZ, INC.
5550 Perkiomen Ave.
Reading, PA 19606
(215) 582-2081
William Zeswitz, Sec./Treas.
Full line music retailer

AVEDIS ZILDJIAN COMPANY
Longwater Dr.
Norwell, MA 02061
(617) 871-2200
Armand Zildjian, President
Manufacturer of Avedis Zildjian, K. Zildjian, Z Zildjian, Scimitar and Scimitar Bronze cymbals; Zildjian drumsticks and assorted percussion accessories